

TO: Distribution

FROM: Marketing Information & Analysis/Bruce Neidle

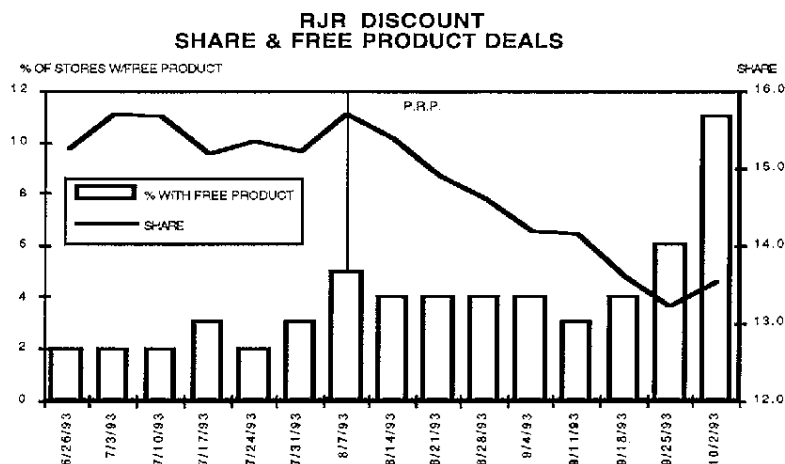
SUBJECT: NIELSEN WEEKLY C-STORE TRACKING REPORT

DATE: October 18, 1993

The following report is based on weekly Nielsen C-store audits through w/e 10/2/93.

KEY FINDINGS

- Driven by Marlboro and Other PM Premium brands, PM posted its third consecutive week-to-week share gain, advancing +0.1 points versus week-ago and +0.9 points since the w/e 9/11 to 47.0%. Since the start of PRP (w/e 8/7), PM's total share has remained relatively stable while its contribution from Premium products has expanded +3.1 points to 79.4%.
- Marlboro realized its third consecutive weekly share gain, advancing +0.2 points versus week-ago and +1.0 points in the last three weeks, while on a four week basis the franchise remained stable versus four weeks ago at 28.9%. During the last several weeks, Marlboro's average days supply at retail has increased slightly to 11.2% and its share of total inventory has remained stable at about 15.2%.
- Winston experienced a -0.2 point week-to-week decline as expansion of Select B1G1F offers was offset by continued depletion of its 40¢ off-label product. On a four week basis, Winston was +0.3 points above four weeks ago. Winston Select Lights' share reached 1.5% during its tenth week at retail, while the percent of stores stocking held at 60% (indicating a 2.5% share in stores stocking). Total Select (Full Flavor and Lights) now accounts for 37% of total Winston volume.
- Following a -3.3 point decline during the prior seven weeks, the Discount category advanced +0.1 points versus week-ago to 33.0%. This week-to-week gain was driven primarily by RJR's discount products, with Doral and Monarch advancing +0.2 and +0.1 points respectively. Both of these entries benefited from increased promotional support, with the percent of stores offering a free product deal on a RJR discount product nearly doubling versus week ago to 11%.



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- Basic's share remained stable this week at 5.7%, while the percent of stores stocking the brand expanded +2 points to 84%.
- Average retail prices have remained fairly stable for the last four weeks, with the percentage price gap between Marlboro and Deep Discount (volume weighted average) holding at 33%.

NIELSEN WEEKLY C-STORE TRACKING REPORT - W/E 10/2/93
October 18, 1993

Distribution:

R. Anise	N. Ellis	M. Klein	M. Murphy	A. Sinha
M. Anton	C. Finch (R3)	L. Lembo	W. Murray	C. Shore
D. Ball	S. Fuller	S. LeVan	D. Nelson (R1)	J. Spector
T. Beane	T. Garguilo	C. Levy	J. Nelson	D. Stern
D. Beran	E. Gawronski	B. Lewis	T. Nelson	N. Suter
D. Berenson	E. Gee	J. Lichtman	B. O'Brien	M. Szymanczyk
G. Bible	A. Goldfarb	H. Long	R. Olson (R4)	J. Taylor
B. Bittner	J. Greene	H. Lu	V. Penninti	J. Turner
G. Blumenson	H. Harwood	N. Lund	S. Piskor	R. Webster
J. Bonhomme	P. Henriques	M. Mahan	J. Raporte	I. Weinkselbaum
R. Bucciarelli	J. Heironimus	A. Marrullier	M. Rolnick	B. Weinstein
W. Campbell	K. Houghton	T. McGovern	C. Rundle	L. Wexler
J. Champ	J. Isaacs	R. Mikulay	S. Rush	R. Whalen
J. Clary (R2)	S. Jannetta	D. Miller	T. Saloun	
C. Cohen	C. Johnson	K. Miller	M. Schroeder	
S. Darrah	L. Johnson	M. Moore	B. Schuyler	
N. Davis	E. Joyce	J. Morgan	C. Schwab	
G. D' Alessandro	J. Kiernan	J. Mortensen (R5)	A. Schwartz	
K. Eisen	R. King	C. Murray	R. Simons	

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